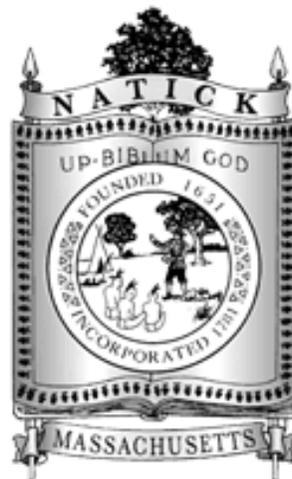


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Town of Natick

**Facility Management Study
Final Report**

September 2011



Town of Natick

Facilities Management Study

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**Section I:
Executive Summary**

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Section I: Executive Summary

Beginning in June 2010, the Board of Selectmen approved Town Administration's undertaking of a study of Facility Management. The primary focus of this initial study was the potential consolidation of municipal and school building maintenance operations, along with the municipal divisions of Land, Facilities & Natural Resources and Municipal Energy. A preliminary report was presented to the Board of Selectmen in late November 2010.

Upon receiving this report, the Board of Selectmen authorized the creation of a Facility Management Study Committee (the "Study Committee"), with the task of reviewing the Administration's preliminary findings and exploring the consolidation of Facility Management services. This committee was comprised of two members of the Board of Selectmen, two members of School Committee, the Town Administrator and the Superintendent of Public Schools. The committee met over the ensuing eight months and with the assistance of Town and School Administration conducted a series of meetings, interviews and compilation of data and information.

The Facility Management Study Committee has approved four strategic goals pertaining to this effort. They include:

- Improve the quality and value of services delivered to facility users, taxpayers and related constituents
- Maximize the lifespan of Town-owned assets
- Achieve operational efficiency and/or cost reduction relating to Town facility management
- Establish and demonstrate an effective process for collaboration (between General Government and School System, in this case)¹

While this study is a product of the Town Administration, work of the Study Committee is referenced and utilized in developing alternatives and recommendations. Specifically, the proposed Alternatives to the current service delivery model (Section V) and Recommendations (Section VI) have been developed by the Town Administration and have not necessarily been endorsed by the Study Committee.

¹ Facilities Management Study Committee Goals Draft v 082911. Paul Joseph. August 29, 2011. Pages 1-2. These goals were formally adopted on September 20, 2011 and can be found in Appendices.



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Evaluation of any service must be performed via the use of industry-accepted metrics. Subjectivity, though a part of anything having to do with political governance, must always take a back seat to pragmatic and practical data. That being said, to measure a program based upon the “bottom line” alone inappropriately disregards non-monetary and other less tangible aspects of public service. Nonetheless, this study is intended, to the greatest extent possible, to reach objective, well-reasoned conclusions.

As with any study, one cannot simply begin measuring without first defining what exactly it is being studied. “Facility Management”, as examined within this report, is best defined as the following:

The maintenance, management and operation of the physical structures and facilities developed or acquired by public agencies to house governmental functions and are managed by experienced, intelligent, dedicated professionals who facilitate and ensure continuously better service to the public.²

As a result of nearly 15 months of research and review, Town Administration believes that sufficient evidence exists to support the consolidation of Facility Management services between the municipal government and schools in Natick.

This report is organized in an orderly format. Section II examines the history of facility maintenance in Natick. Section III provides detailed information on the current provision of facility maintenance in Natick. Section IV provides information on Comparable Communities, and in particular comparable communities that have already consolidated municipal and school building maintenance functions. Section V outlines Town Administration’s recommended consolidation strategy for Facility Management in the Town of Natick. Section VI summarizes those recommendations and next steps for the Board of Selectmen, School Committee and others to consider. Finally, much of the supplemental materials collected during the course of this study are found in Section VII: Appendices.

As with all studies of this type, Town Administration is pleased to present what we have collected to date, and eagerly invites any feedback, suggestions or criticisms which may come

² This definition is borrowed and modified directly from Donald C. Stone’s work Professional Education in Public Works/Environmental Engineering and Administration (Chicago: American Public Works Association, 1974) and Sam M. Cristofano, and William S. Foster, (ed.) work Management of Local Public Works. Washington, D.C.: International City/County Management Association, 1986. The actual quote (contained in Cristofano & Foster, et. al. work) is:

“Public works are the physical structures and facilities that are developed or acquired by public agencies to house governmental functions and provide water, power, waste disposal, transportation, and similar services, and are managed by experienced, intelligent, dedicated professionals to facilitate and ensure continuously better service to the public.”



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forth from this report. Our goal is to provide policymakers with the tools necessary to make educated and informed decisions. We hope this report does exactly that.

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Section II: Historical Perspective

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Section II: Historical Perspective

Since the time that Natick was founded, some degree of facility management has existed.

At the turn of the last century, maintenance of Town facilities and infrastructure was highly decentralized. Custodian and routine maintenance functions were budgeted for and controlled in respective Town Departments. The only departments that managed a defined public infrastructure were the Water Commissioners and the Sewer Commissioners. This changed in 1904 when the Town established a Parks Commission³, and again in 1914 with the establishment of a Highway Surveyor.

The first outright attempt to centralize public works and facility management facilities was taken in 1921 with the creation of a Public Works Commission and the Department of Public Works. This effort placed the Sewer, Water and Highway Departments under the direction of one Superintendent, answerable to the Public Works Commission. The First Annual Report of the Department of Public Works mentions many of the initial challenges and successes involved with the consolidation of separate departments, but also provided this positive sentiment from Superintendent Mosher:

"Your Superintendent feels that substantial savings have already resulted from centralization of effort in both field and office work and will continue in a more marked degree as further improvement are inaugurated."⁴

Throughout the ensuing sixty years, numerous ad hoc committees were created which reviewed and developed recommendations regarding public works and building functions. Many of these committees were primarily focused on either the renovation of or creation of new facilities – both municipal and school related. Functionally, the Public Works department remained unchanged – with only the addition of the Sanitation Department during that time period. The Parks Department underwent a series of changes over the ensuing sixty years from 1921, eventually being combined into the Recreation and Parks Department in the 1960's. A separate Forestry Department was created in 1961⁵, whereby previously separate functions of the Tree Warden and the Town Forest were organized under one service area.

The greatest period of change and consolidation in the provision of facility maintenance in Natick occurred in the late 1970's and early 1980's. First, after a year and one half of study, a recommendation was put forward in 1979 (and eventually favorably acted upon) to consolidate

³ Town of Natick, Park Commissioners' Report, Reports of Town Officers with a Statement of the Receipts and Expenditures of the Town of Natick for the year ending January 31, 1905. (Natick, Mass: Press of Natick Bulletin, 1905) 88.

⁴ Town of Natick, Report of the Superintendent, Natick Town Report. (Natick, Mass: Press of Natick Bulletin, 1922) 164.

⁵ Town of Natick, Forestry Department, 181st Annual Report of the Town of Natick, Massachusetts. (Wellesley, Mass.: Wellesley Press, Inc., 1962) 35.



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the Forestry and Public Works Departments.⁶ The eventual culmination of this consolidation effort was the creation of the Land, Facilities and Natural Resources Division of the Department of Public Works at the beginning of FY 1984 (July 1, 1983). This combined division included the old Forestry Department, the Tree Warden, as well as responsibility of the school grounds & fields, and municipal parks.⁷ It was stated that:

“With the establishment of the Land Facilities and Natural Resources as a new division of the Department of Public Works, inter-related department problems will be able to be acted upon more readily thereby serving the public in a more efficient and prompt manner.”⁸

The second major change to the management of facility maintenance, public works and indeed, town governance, occurred in 1980 when the Town radically altered its Charter. In addition to the more well known creation of the position of the Town Administrator, it also abolished the Public Works Commission and placed all responsibilities under a Director of Public Works answerable directly to the Town Administrator.⁹

Prior to the mid-1980’s, building maintenance services were decentralized throughout the municipal and school buildings. On the municipal side, custodians were budgeted within individual departments and in effect each department was responsible for the daily upkeep of their own facilities. Since the mid-1980’s, however, efforts have been made to combine some degree of custodial functions on both the school and municipal sides. The first analysis specifically aimed at evaluating the building maintenance functions of the Town and Schools came in the late 1990’s. At that time, both the Municipal and school sides of Town governance created a Building Maintenance Task Force for the purpose of:

“...conducting a comprehensive review of municipal and school department maintenance departments in order to evaluate the most responsible manner for these departments to service the public buildings.”¹⁰

The internal Task Force, comprised of various municipal and school officials, spent time gathering pertinent information about the respective building maintenance functions of both the municipal and school sides of the Town. At the end of their review, the Task Force made the following four recommendations:

⁶ Town of Natick, Committee to Study the Feasibility of the Possible Takeover of the Forestry Department by the Public Works Department, 199th Annual Report of the Town of Natick, Massachusetts. 63-64.

⁷ Town of Natick, Department of Public Works Report, 203rd Annual Report of the Town of Natick, Massachusetts. 24-25.

⁸ Ibid.

⁹ Town of Natick, Charter Commission, 199th Annual Report of the Town of Natick, Massachusetts. 41-43. The elimination of the Public Works Commission also resulted in the Board of Selectmen becoming the Water/Sewer Commissioners for the Town of Natick.

¹⁰ Building Maintenance Task Force, memo to Frederick C. Conley, Town Administrator and Dr. Raymond Glynn, Superintendent of Schools, Natick, February 26, 1998.



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- Consolidation of Energy Purchases
- Incorporate Vehicle Maintenance from School to DPW
- Reassigning School Building Turf/Shrubbery and Landscaping Immediately Around the Schools from School Custodians to LFNR Division
- Formal Consolidation of Combined Maintenance and repair Division for the Schools and Town¹¹

Of these four recommendations, only one was actually implemented – that of school vehicle maintenance being handled by the DPW Equipment Maintenance division. Consolidation of Energy Purchases was not able to be made at the time due to the elimination of a state agency which would have allowed for joint energy purchasing at reduced rates.¹² School Building Turf was not consolidated with LFNR because it was determined the net increase in staff necessary to adequately handle the added workload was 3 employees while no net decrease in school custodians could be achieved.¹³

Finally, it is the last recommendation – Formal Consolidation of Combined Maintenance and Repair Division for Schools and Town – that requires more study.

The Task Force wrote the following:

“The task force agreed upon a concept of a “permanent person” plan for the maintenance of municipal buildings. This means that one custodian would be responsible, i.e. accountable, for the care and cleaning of a particular building. It was also discussed that each segment, town and school, would answer to one common but impartial manager. Merits of combining the two maintenance divisions would be assisting each division during peak, crisis, or emergency periods.

Unfortunately, the demands of the municipal complex and the new school buildings have strained the resources of both the Town and School maintenance operations. It was determined that a consolidated maintenance department would not result in any reduction in personnel. There were also no clearly identified benefits of having a consolidated department with respect to efficiencies in operations. There was a concern that a larger department would result in a lesser attention to the particular needs of the building users in both the schools and town facilities, Therefore, there did not seem to be any overall advantage to move towards consolidation.¹⁴”

No further analysis was found in the archives to further determine the reason for this finding.

¹¹ Cohen, Paul E., Deputy Town Administrator, memo to Board of Selectmen, Natick, December 20,1999.

¹² Ibid.

¹³ Ibid.

¹⁴ Ibid.



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Finally, one final round of consolidation of public works functions came in 2004, when the Highway and Sanitation Divisions were consolidated. This has allowed for greater flexibility of operations within the Department of Public Works.¹⁵

Summary

Natick has a long and established history of providing a variety of public works and facility management services – and just as long a period and history of studying and revising service delivery models in an effort to enhance the quality and efficiency of the delivery of those services. Whereas the efforts of consolidation discussed to this point have dealt with a variety of departments and functions, , the ensuing sections of this study focus solely on Facility Management. The next section will detail how Natick provides this service today.

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¹⁵ Town of Natick, Department of Public Works Report, 225th Annual Report of the Town of Natick, Massachusetts. 56-57.



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Section III:
Current Service Delivery Model

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Management of School Facilities
Management of Municipal Facilities
Shared provisions for Facility Management



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Section III: Current Service Delivery Model

Facility Management in the Town of Natick is provided in both the School and Municipal sides of Town Government. In the current model, some degree of coordination already occurs between the two agencies, notably in the areas of grounds maintenance and some energy purchasing. All facility maintenance functions are detailed in the ensuing pages.

Management of School Facilities:

The Natick Public Schools' Facility Services Department has the primary responsibility for the maintenance, operation, and repair of the 8 elementary, middle and high schools within the Town of Natick. Responsibilities cover routine cleaning, standard repairs and planned maintenance as well as planning and coordination of major additions, renovations or repairs.¹⁶ Construction of new facilities has, by Town practice, been overseen through ad hoc building committees run by citizen volunteers.

Facilities

The Facility Services Department has direct oversight over 8 school buildings, totaling more than 773,000 Gross Square Feet (GSF)*. They are listed below.

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.
Bennett Hemenway Elementary School	22 East Evergreen Road	1998	80,000	56000
Brown Elementary School	1 Jean Burke Drive	1975	54,000	37800
Johnson Elementary School	105 South Main Street	1940	26,000	18200
Kennedy Middle School	Trevor Lane	1965	106,000	74200
Lilja Elementary School	41 Bacon Street	1990	54,000	37800
Memorial Elementary School	97 Eliot Street	1960	65,000	45500
Natick High School (new)	TBD	2012	254,000	177800
Wilson Middle School	22 Rutledge Street	2004	134,000	93800
Total - inclusive of NEW Natick High School*			773,000	541,100

*Old Natick High School had 293,000 Gross Sq. Ft. (approx. 205,100 Net Sq. Ft.)

¹⁶ Graham, Robert. Memo to Michael Walters Young. May 11, 2011.



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Staffing

As of May 2011, the Natick Public Schools employed 37 individuals for the function of maintaining, operating and repairing its 8 school buildings. These are shown by position below.

FY 2012 Funded Position	FY 2012 Count
Management	
Director of Facility Services	1
Facility Services Manager	1
Custodians	
Senior Custodian III	2
Senior Custodian II	1
Senior Day Custodian I	6
Junior Custodian II – Afternoon	4
Junior Custodian II – Night	3
Junior Custodian I – Day	2
Junior Custodian I – Afternoon	6
Junior Custodian I – Night	6
Assistant Night Custodian	1
Maintenance Mechanics/Trades	
Maintenance III	3
Maintenance Mechanic IV	1
Total	37

Seasonal/temporary workers are also employed during summer months to perform a wide variety of maintenance and repair activities.

Central to the operation of the Facility Services Department is the use of staff custodians to provide day-to-day cleaning and minor maintenance services. Custodians are responsible for the following in addition to cleaning services:

- Changing light bulbs
- Changing filters
- Repairing furniture
- Snow removal around school buildings (e.g. walkways)
- Grass cutting around school buildings (but not athletic fields)
- Moving furniture and equipment
- Preparing and managing for numerous events (elections, functions, sound & lighting for stage productions)



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- And frequent other requests from teachers or administrators.¹⁷

Maintenance Mechanics are what would otherwise be referred to as trades-people. The four individuals employed by the Natick Public Schools have general maintenance skills and can perform general service on a variety of building and mechanical systems. They also have a degree of skill in the following areas:

- Locks & Hardware
- Glazing (of windows and surfaces)
- Painting
- Plumbing
- Heating, Ventilation and Air Conditioning (HVAC)¹⁸

Contracted Services

The Natick Public Schools use contractors for maintenance and repair of:

- Boiler & HVAC Systems
- Electrical Systems
- Plumbing Systems
- Alarm & Security Systems
- Roofing Systems, and
- Medium to Large Capital Projects¹⁹

The Director of Facility Services and the Facility Services Manager are responsible for all oversight of the department. The Director is responsible for all budgeting, capital forecasting, procurement and project management responsibilities. The Facility Services Manager is responsible for day-to-day oversight of the custodial and maintenance functions, including personnel assignment, management and recordkeeping, purchasing of supplies and maintaining the work order system.

Budget

The Natick Public Schools budgets for their facility management under the Operations and Maintenance section of their annual operational budget. In the following chart, all costs

¹⁷ Ibid.

¹⁸ Ibid.

¹⁹ Ibid.



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(including benefits) for employees of the Facility Services Department are shown for the purposes of comparing costs in the Performance Metric subsection.²⁰

School Facilities Services Costs	2009	2010	2011	2012	2011 vs 2012	
	Actual	Actual	Appropriated	Appropriated	\$	%
Custodial Services - Supervisory	157,166	157,166	157,166	163,515	6,349	4.0%
Custodial Services - Operational	1,682,947	1,654,956	1,604,026	1,660,682	56,656	3.5%
Sub-Total Compensation	1,840,113	1,812,122	1,761,192	1,824,197	63,005	3.6%
Custodial Services	120,047	126,565	115,000	115,000	0	0.0%
Energy						
Fuel for heating of buildings	663,318	540,190	740,000	691,250	(48,750)	-6.6%
Electricity	770,203	665,155	870,000	782,464	(87,536)	-10.1%
Telephone	62,946	72,064	75,000	75,000	0	0.0%
Building Repairs	640,838	446,827	462,000	462,000	0	0.0%
Vehicle Maintenance Other	8,704	10,833	8,000	8,000	0	0.0%
Network and Telecommunications	146,971	173,423	197,592	184,062	(13,530)	-6.8%
Sub-total Expenses	2,413,027	2,035,056	2,467,592	2,317,776	(149,816)	-6.1%
Total - Facilities Costs budgeted under NPS	\$ 4,253,140	\$ 3,847,178	\$ 4,228,784	\$ 4,141,973	\$ (86,811)	-2.1%
Benefit Costs for Facility Service Employees	\$ 287,888	\$ 330,286	\$ 339,345	\$ 356,801	\$ 17,456	5.1%
Total - Facilities Costs for Schools	\$ 4,541,028	\$ 4,177,464	\$ 4,568,129	\$ 4,498,774	\$ (69,355)	-1.5%

Performance Metrics

There is no universally agreed to set of metrics or measurements used to evaluate the performance and/or efficiency of facility management in **any** sector – public, private, non-profit, institutional, etc. For a very long time, the basis of success in facility management has been if the end users are satisfied with the overall state of the facility for their needs. While this is not to be discounted (and in fact is an important criterion when determining the effectiveness of service delivery in any field), it is a highly subjective method of performance evaluation.

Within the last decade, facility management professionals have increasingly been working to develop more objective ways of evaluating the efficiency and performance of their employees. The International Facility Management Association (IFMA) has led some of these initiatives. In an attempt to begin evaluate the performance of Natick’s existing facility management services; this report applies performance and efficiency measures found in Research Report #32: Operations and Maintenance Benchmarks from the IFMA.²¹ While this will not be the only criterion used, it is important to gauge the cost effectiveness of any service so as to maximize the use of limited taxpayer resources.

²⁰ Benefits, however, are budgeted formally under the Shared Expense section of the annual operating budget.

²¹ International Facility Maintenance Association. Research Report #32: Operations and Maintenance Benchmarks. Houston, TX. 2009.



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The performance metrics shown herein are for illustrative purposes to demonstrate the relative cost effectiveness of existing services when compared to industry standards. The study referenced above uses those specific industry metrics whenever possible to make as accurate a comparison as possible. Thus, when measuring custodial staffing or the amount of square footage per occupant, it is a comparison of educational facilities to educational facilities, or government office buildings to government office buildings. Some of these facilities are much larger on the whole than Natick's physical plant. While not exact, it does serve as functional and objective measure of cost effectiveness.²² It should be noted that these comparisons take into account only personnel; contract services are not included.

Workload	Natick Public Schools		Industry Standard
Buildings			
Gross Square Footage of School Buildings	773,000	GSF	N/A
Net (Rentable) Square Footage of School Buildings	541,100	RSF	N/A
Number of Buildings Served	8	buildings	N/A
Constituents			
Average Daytime # of Participants (Students + Teachers & Staff)	5,247	persons	N/A
Staffing			
Number of Custodians (Junior/Cleaning)	23	persons	37.3 persons
Number of Custodians (Senior/Supervising)	8	persons	9.6 persons
Number of Tradespeople	4	persons	16 persons
Efficiency			
		Natick Public Schools	Industry Standard
General			
G.S.F./Occupant	147	GSF	425 GSF
N.S.F. (R.S.F.) / Occupant	103	NSF	365 RSF
Participants served/Custodian	169	people/ custodian	N/A
GSF/Custodian	31,337	GSF	29,015 GSF
Cost			
Overall Energy Costs/GSF	\$	1.91	\$ 2.24
Overall Facilities Maintenance Costs/RSF	\$	7.36	\$ 6.57
Energy*			
Electricity (kWh)	5.09	kWh/GSF	5th Percentile
Natural Gas (Therm)	0.21	Therm/GSF	40th percentile
Heating Oil (BTU)	0.22	Gall./GSF	92nd percentile

*Energy percentiles shown: 99 is least efficient, 1 is most efficient/best in class

²² Note: The terms Net Square Foot and Rentable Square Foot are used interchangeably for performance metrics presented herein. They are effectively the same thing for the purpose of this study. "Rentable Square Foot" is the metric used for most benchmark calculations according to the International Facilities Management Association.



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Management of Municipal Facilities:

The Department of Public Works Building Maintenance Division maintains the remainder of the facilities in the Town of Natick – whether they are offices, public safety stations, community centers. The Department of Public Works also manages the energy consumption and budgets for all municipal properties. The Natick Public Schools manages energy consumption for all school properties.²³

Facilities

The Town of Natick maintains 21 separate properties totaling over 387,000 square foot in three distinct categories; buildings operated primarily by general fund operations, water & sewer operations and leased properties.

General Fund:

Facility Name	Address	Year Built	Gross Sq. Ft.
Cole Recreation Center	179 Boden	1956	24,850
Community Senior Center*	115 East Central Street	1950	24,332
Recycling Center	251 South Main Street	1980	2,448
DPW Administration	75 West Street	1970	36,096
DPW Vehicle Service	75 West Street	1973	35,420
Fire Station 3	2 Rhode Island Avenue	1958	3,222
Fire Station 2	210 Union Street	1950	2,050
Fire Station 4	268 Speen Street	1956	4,882
Gravel Pit/Salt Shed	Oak St	1995	7,680
LFNR Garage	West Street	1980	750
Bacon Free Library	56 Eliot Street	1880	5,499
Morse Institute Library	14 East Central Street	1997	60,680
Police & Fire Headquarters	20 East Central Street	1998	53,970
Town Hall	13 East Central Street	1998	31,741
East School	90 Oak Street	1950	24,869
Total			318,489

* Note: Community/Senior Center is currently being replaced and is under construction. The gross sq. ft. amount will change.

²³ It should be noted that although some energy purchases are made jointly between municipal and schools departments (including vehicle fuels and electricity), the schools can take advantage of reduced energy costs for natural gas and heating oil by purchasing through the TEC collaborative. Municipal departments are ineligible to purchase through the TEC Collaborative.



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Water and Sewer:

Facility Name	Address	Year Built	Gross Sq. Ft.
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1996	2,784
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1906	4,674
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1960	1,124
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	2005	5,288
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	2005	3,920
Total			17,790

Leased Properties:

Facility Name	Address	Year Built	Gross Sq. Ft.
Eliot School	5 Auburn Street	1938	14,014
William L. Chase Arena	75 West Street	1970	32,508
Total			46,522

Miscellaneous Recreation Facilities:

Facility Name	Address	Year Built	Gross Sq. Ft.
JJ Lane Park	Speen St	1995	270
Memorial Beach Building	West St	1980	2,160
Camp Arrowhead	Worcester Rd	1980	2,064
Camp Mary Bunker	Megonko Rd	1995	648
Total			5,142

For the purposes of comparison in the Performance Metrics sub-section, only the buildings which are regularly occupied and maintained are accounted for under "Gross Square Feet" (*This only includes buildings within General Fund and Water & Sewer lists, or 336,279 GSF.*)

Staffing

The Building Maintenance Division of the Department of Public Works currently employs 6 individuals for the function of maintaining, operating and repairing its 21 municipal buildings. These are shown by position below.

FY 2012 Funded Position	FY 2012 Count
Management	
Building Maintenance Division Supervisor	0*



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Custodians	
General Foreman	1
Custodians	4
Trades	
Painter	1
Total	6

**With the retirement of the incumbent Building Maintenance Division Supervisor, the position was not filled or funded in FY 2012 pending the completion and findings of this study.*

The custodial staff is supplemented by a contract cleaning service which is responsible for daily cleaning of municipal buildings.

Custodians are responsible less routine cleaning and minor maintenance functions, including:

- Changing light bulbs
- Changing filters
- Repairing/moving furniture & equipment
- Snow removal around municipal buildings (including walkways & approaches to entrances & egresses)
- Preparing and managing for numerous events (meetings & functions within municipal buildings)
- Systems maintenance and operation (i.e. lighting and HVAC system operation in Town buildings)
- Other requests from administrators as necessary.

The one skilled laborer employed by the Building Maintenance Division is a painter. Added to the budget several years ago, the painter has reduced costs of small and medium painting jobs throughout municipal buildings as compared to private contractors.²⁴ The division does not have maintenance mechanics/tradespeople similar to the Natick Public Schools.

Contracted Services

The Department of Public Works uses contractors for the tasks of:

- Locks & Hardware
- Window Maintenance & Repair (including glazing of windows and surfaces)
- Medium to Large Capital Projects
- Boiler & HVAC Maintenance & Repair

²⁴ One of the key reasons why privatizing is more expensive in the trades in Massachusetts is that virtually all municipal building work is subject to prevailing wage laws. The experience of bringing the painter in-house has educated municipal public works officials that the added flexibility of having the municipal employee to do painting and other work has enhanced the product – and reduced bottom-line costs.



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- Electrical Maintenance & Repair
- Plumbing Maintenance & Repair
- Alarm & Security Systems Maintenance & Repair
- Roofing Maintenance & Repair

The Building Maintenance Division utilizes a computerized management system to generate work orders, prepare accurate reports and project workloads. A central computerized HVAC system allows the division to monitor and control the temperature and other HVAC functions of the buildings.

Budget

To evaluate the total cost for general government facility maintenance, we need to look at two Divisions of DPW – Building Maintenance and Energy.

Building Maintenance Division Budget

DPW Building Maintenance	2009 Actual	2010 Actual	2011 Appropriated	2012 Appropriated	2011 vs. 2012 \$ (+/-) % (+/-)	
Salaries Supervisory	\$ 83,034	\$ 70,244	\$ 86,409	\$ 8,819	\$ (77,590)	-89.79%
Salaries Operational Staff	\$ 225,349	\$ 248,824	\$ 257,509	\$ 270,476	\$ 12,968	5.04%
Salaries Part-Time Operational	\$ -	\$ -	\$ 3,750	\$ 3,460	\$ (290)	-7.73%
Supervisory Staff Add'l Comp	\$ 7,708	\$ 8,352	\$ 9,850	\$ 6,500	\$ (3,350)	-34.01%
Operational Staff Add. Comp	\$ 2,170	\$ 4,992	\$ 2,625	\$ 7,600	\$ 4,975	189.52%
Operational Staff Overtime	\$ 29,490	\$ 39,138	\$ 25,900	\$ 32,650	\$ 6,750	26.06%
Personnel Services	\$ 347,751	\$ 371,550	\$ 386,043	\$ 329,505	\$ (56,538)	-14.65%
Repairs & Maint. Facilities	\$ 275,560	\$ 245,756	\$ 270,000	\$ 270,000	\$ -	0.00%
Repairs & Maint. Eliot School	\$ 71,953	\$ 84,716	\$ 26,400	\$ 22,500	\$ (3,900)	-14.77%
Repairs & Maint. Elevator/Chair lift	\$ 29,388	\$ 17,635	\$ 27,500	\$ 19,500	\$ (8,000)	-29.09%
Purchase of Services	\$ 347,513	\$ 348,108	\$ 323,900	\$ 312,000	\$ (11,900)	-3.67%
Clothing Allowance Oper. Staff	\$ 1,954	\$ 2,100	\$ 2,100	\$ 2,100	\$ -	0.00%
Other Services (Misc.)	\$ 1,954	\$ 2,100	\$ 2,100	\$ 2,100	\$ -	0.00%
Contractual Svs - Cleaning	\$ 104,104	\$ 85,542	\$ 96,500	\$ 95,800	\$ (700)	-0.73%
Tech/Professional Services	\$ 104,104	\$ 85,542	\$ 96,500	\$ 95,800	\$ (700)	-0.73%
Custodial Supplies	\$ 44,247	\$ 36,044	\$ 40,000	\$ 40,000	\$ -	0.00%
Other Supplies	\$ 44,247	\$ 36,044	\$ 40,000	\$ 40,000	\$ -	0.00%
Total - Build. Maint. Costs (DPW)	\$ 845,570	\$ 843,344	\$ 848,543	\$ 779,405	\$ (69,138)	-8.15%
Benefit Costs - DPW	\$ 54,835.75	\$ 62,911.62	\$ 64,637.06	\$ 67,962.00	\$ 3,324.94	5.14%
Total All Building Maint. Costs	\$ 900,405	\$ 906,256	\$ 913,180	\$ 847,367	\$ (65,813)	-7.21%



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Municipal Energy

Municipal Energy	2009 Actual	2010 Actual	2011 Appropriated	2012 Appropriated	2011 vs. 2012 \$ (+/-) % (+/-)	
Street Lighting						
Street Lighting Expenses	\$ 201,761	\$ 194,832	\$ 228,500	\$ 228,500	\$ -	0.00%
Contractual Services	\$ 51,440	\$ 44,815	\$ 53,800	\$ 57,700	\$ 3,900	7.25%
Buildings						
Bldg Maint - Utilities: Electric	\$ 489,790	\$ 479,208	\$ 545,000	\$ 562,400	\$ 17,400	3.19%
Recreation - Utilities Electric	\$ 6,306	\$ 3,743	\$ 7,600	\$ 4,200	\$ (3,400)	-44.74%
Highway - Utilities Electric	\$ 4,260	\$ 6,157	\$ 4,300	\$ 7,100	\$ 2,800	65.12%
Bldg Maint - Utilities: Fuel Oil & Nat. Gas	\$ 208,178	\$ 141,179	\$ 204,300	\$ 168,200	\$ (36,100)	-17.67%
Vehicles						
Eqp Maint - Vehicular Supplies: Gasoline	\$ 323,567	\$ 324,338	\$ 381,500	\$ 463,800	\$ 82,300	21.57%
Purchase of Services	\$ 1,285,302	\$ 1,194,272	\$ 1,425,000	\$ 1,491,900	\$ 66,900	4.69%
Holiday Lighting	\$ 1,094	\$ 405	\$ 1,000	\$ 1,500	\$ 500	50.00%
Other Supplies	\$ 1,094	\$ 405	\$ 1,000	\$ 1,500	\$ 500	50.00%
Total DPW Energy	\$ 1,286,396	\$ 1,194,677	\$ 1,426,000	\$ 1,493,400	\$ 67,400	4.73%

Performance Metrics

Just as the measures used for the Natick Public Schools, the performance metrics shown herein are for illustrative purposes to demonstrate the relative cost effectiveness of existing services when compared to industry standards. The study referenced above uses those specific industry metrics whenever possible to make as accurate a comparison as possible. Thus, when measuring custodial staffing or the amount of square footage per occupant, it is a comparison of educational facilities to educational facilities, or government office buildings to government office buildings. While not exact, it does serve as functional and objective measure of cost effectiveness.²⁵ It should be noted that these comparisons take into account personnel; AND contract services.

²⁵ Note: The terms Net Square Foot and Rentable Square Foot are used interchangeably for performance metrics presented herein. They are effectively the same thing for the purpose of this study. "Rentable Square Foot" is the metric used for most benchmark calculations according to the International Facilities Management Association.



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Workload	Municipal		Industry Standard
Buildings			
Gross Square Footage of Municipal Buildings	387,943	GSF	N/A
Net (Rentable) Square Footage of Municipal Buildings	302,120	RSF	N/A
Number of Buildings Served	19	buildings	N/A
Constituents			
Average Daytime # of Participants (Citizens & Staff)	1,781	persons	N/A

Workload	Municipal		Industry Standard
Staffing			
Number of Custodians (Junior/Cleaning)	4	persons	13.1 persons
Number of Custodians (Senior/Supervising)	1	persons	1.7 persons
Number of Tradespeople	1	persons	8.67 persons
Number of Hours Served - Employees	15,250	hours	N/A
Number of Hours Served - Contracted Services	8,700	hours	N/A
Number of Requests Taken	2,600	requests	N/A

Efficiency	Municipal		Industry Standard
General			
G.S.F./Occupant	218	GSF	520 GSF
N.S.F. (R.S.F.) / Occupant	170	NSF	423 RSF
Participants served/Custodian	356	people/ custodian	N/A
GSF/Custodian	N/A*		29,015 GSF
Cost			
Overall Energy Costs	\$	1.91	\$ 2.32
Overall Facilities Maintenance Costs	\$	7.75	\$ 6.73
Energy**			
Electricity (kWh)	7.74	kWh/GSF	10th Percentile
Natural Gas (Therm)	0.37	Therm/GSF	60th percentile
Heating Oil (Gallons)	0.06	Gall./GSF	22nd percentile
Water (Gallons)	9.49	Gall./GSF	41st Percentile

*N/A as custodial services is contracted out in large part by Municipal DPW. Only schools currently using per square foot ratio in a comparable way.

**Energy percentiles shown: 99 is least efficient, 1 is most efficient/best in class

Summary

There are a number of functions that are complimentary or interrelated with Facility Management, and which reflect a certain amount of existing collaboration between the Municipal and School sides, including:

School Grounds (Athletic Fields): This has been controlled by the Land, Facilities and Natural Resources Division of the Department of Public Works since 1983. The staff of the L, F and NR division is responsible for the maintenance of all municipal and school



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athletic fields, parks, and tree maintenance. All told, they are responsible for 61 fields town-wide.

Vehicle Maintenance: This has been controlled by the Equipment Maintenance Division since 1998. All school and municipal vehicles are serviced by the mechanics at 75 West Street in the DPW Vehicle Service building.

Snow Plowing: All divisions of DPW are responsible in the case of a snow event to assist with plowing. DPW laborers plow streets and routes to schools – including parking lots and sidewalks up to school buildings.

Energy: Vehicle fuels and Electricity are purchased completely through the Department of Public Works, and budgeted in the DPW Municipal Energy budget.

There are also areas where deficiencies are known to exist in both the municipal and school provisions for Facility Management. They include:

Tech-Based Buildings: The citizens of Natick graciously approved two debt exclusions to fund a new Natick High School and a new Community/Senior Center. With these buildings comes a series of new building designs and whole new building technologies. Light switches will no longer solely control lights in a room – instead computer managed lighting systems can manage the degree of light in a room based on photovoltaic sensors. Centralized temperature controls can turn on or off heating and air conditioning units in different zones of a building. The technology is so advanced entire building systems can be monitored from a smartphone and shut-off remotely. These technologies are emerging and some of them will be utilized in the new buildings. The Town must be trained and equipped to maintain these systems. Virtually no one on staff has any expertise in how these systems function beyond a very rudimentary level.

Green Technologies: The Town as a whole (Schools and Municipal) has little to no expertise in the emerging field of green technologies. Although we are a certified Green Community by the Commonwealth of Massachusetts, and we have robustly embarked on adding solar arrays on numerous Town-owned properties in recent years, virtually no one on staff has any expertise in how they are maintained.

Conclusion:

The Town of Natick has a mostly decentralized approach to facility management between its municipal and school departments. In contrast, the Town has successfully consolidated the areas of fields and grounds maintenance and vehicle maintenance. Many communities other than Natick, however, have studied and subsequently implemented consolidation of facility maintenance and management services in recent years, utilizing various models of doing so. With rare exception, these communities report favorable results in terms of operational



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efficiency, professionalization of staff and enhanced operational and capital budgeting and planning. These successes are detailed in the next section.

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Section IV: Comparative Communities

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Survey of Comparable Communities

Focus on: Ashland, Lexington, Milton, Needham, Westwood, Wayland



Section IV: Comparative Communities

It is an old maxim of local government – the services provided by towns are as diverse as the communities they represent. How communities manage and maintain their facilities is no different. For the purposes of examining regional data for this study, comparable communities included those in Metrowest or those with a similar population and size as Natick. The chart showing comparable communities and information about their services is shown below.

Community	Consolidated (Y/N/Partial)	Date of Consolidation	Type/Degree of Consolidation	Currently Studying Consolidation
Natick	Partial	TBD	Fields, Vehicles	Yes
Ashland	Yes	2009	Full	No
Lexington	Yes	2008	Full	No
Needham	Yes	1994	Full	No
Medway	No	N/A	N/A	Yes
Wayland	Yes	2007	Administration & Maintenance	No
Westborough	No	N/A	N/A	Yes
Westwood	Partial	Ongoing	Fields	No

Although different communities have managed their facilities differently, many communities over the last two decades have looked at the management of town-owned facilities (both municipal and school) as an opportunity to achieve positive results through consolidation. In Spring 2011, another Metrowest community conducted a survey of Towns which had consolidated to determine the motivations and reasons why such consolidation has occurred, as well as positive and negative results regarding both the process used to achieve consolidation and the outcome. Of the communities surveyed, the significant majority gave the following as the top 3 reasons to consolidate:

- 1) Achievement of merging the staff, equipment and skills of multiple departments and elimination of duplication.
- 2) Attraction and retention of professional staff in order to meet the needs of the future.
- 3) Combination of capital project design, planning and oversight in one place.²⁶

Other reasons for consolidation included a desire to benefit from joint purchasing and contracting wherever possible, more closely tie the daily maintenance with the renovation and new construction functions of facilities together and allow schools to focus on education. It is

²⁶ Michael J. Rourke. Municipal-School Building Facility Consolidation Survey Summary. Michael J. Rourke Consulting. Natick, MA. Spring 2011.



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interesting to note that the saving of money was not one of the primary reasons for the majority of communities who chose to consolidate.²⁷

Administration and the Study Committee desired to find out more from communities that had either successfully completed or now operated consolidated facility management functions or were in the process of doing so. To achieve this, the study committee members interviewed representatives from four communities – Ashland, Lexington, Milton and Needham. The committee drafted a series of questions to ask the facility department directors/managers in each community.²⁸ Two members of the committee – one member of the Board of Selectmen and one member of the School Committee – then traveled to or spoke on the phone with the four communities and interviewed the department head.

Focus On: Ashland

Ashland began consolidation of its building maintenance functions in 2009 (FY 2010). Full consolidation between the two departments is not yet complete. The Ashland model (found in Section VII: Appendices), consolidated two departments – municipal facilities and school facilities into one shared Department of Public Facilities. The Director is appointed by the Superintendent with the collaboration of the Town Manager. The department head was the first position to be created.²⁹ The primary responsibility initially of the Director of Public Facilities was to coordinate the two distinct departments and foster the sharing of resources whenever deemed appropriate. Issues pertaining to school buildings are worked out between the Director and the Superintendent; issues pertaining to municipal buildings are worked out between the Director and the Town Manager.³⁰

Ashland consolidated for two primary reasons: to save money and to develop town-wide facilities and maintenance experience. To date, quantitative savings have yet to be fully reported, though repair and routine maintenance costs have decreased and joint purchasing has resulted in demonstrable savings to the schools. Staff has not been reduced as a result of consolidation. One of the greatest advantages to consolidation for Ashland has been increased collaboration between all areas of the Town pertaining to facilities management – from daily operations to capital planning and budgeting.³¹

Ashland is unique in that it transitioned consolidation. For the first year, existing departments were kept relatively intact. Employees, budgets and equipment were still budgeted within their separate spheres of municipal and school operations. Maintenance is now budgeted exclusively within the schools budget, but the Director has the latitude of assigning custodians in any town-owned facility.

²⁷ Ibid.

²⁸ Note: The questionnaire can be found in Section VII: Appendices

²⁹ Kevin Johnson, Personal Interview, July 27, 2011

³⁰ John Petrin, e-mail to Martha L. White, 17 June 2010.

³¹ Johnson, Interview.



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Focus On: Lexington

Lexington consolidated its facility maintenance functions in 2008 (FY 2009). Prior to consolidation, The Town of Lexington delivered its building and facility maintenance functions in a similar fashion to Natick. Municipal and School building maintenance were separate functions. In Lexington's case, there was little coordination between the two groups.³²

Effort began two years prior to implementation to study, analyze and come up with a framework whereby consolidation could occur. A critical step in consolidation was the successful adoption of M.G.L. Ch. 71, Sec. 39m by Lexington Town Meeting in 2007.³³ This statute, (recently adopted by the 2010 Natick Fall Annual Town Meeting), allows for consolidation between school and municipal departments. Carl Valente, Town Manager of Lexington, stated that a key to successful coordination and consolidation was the agreement of the Lexington Public Schools.

Today, the Lexington Department of Public Facilities maintains school grounds & shrubbery, manages the combined energy budgets Town-wide, performs all trades work on the 20 municipal and school buildings, performs project management of all capital projects (ranging from small repairs & restorations to complete reconstruction & new building construction), and performs scheduling for all buildings.³⁴ The Director of Public Facilities reports to both the Superintendent of Public Schools and the Town Manager. Issues pertaining to school buildings are worked out between the Director and the Superintendent; issues pertaining to municipal buildings are worked out between the Director and the Town Manager.³⁵

The DPF has actually added, rather than reduced, staff since its inception. These added positions have been technical in nature, and have been funded through efficiencies found through consolidation. To date, the DPF has hired a Director, a couple of technical professionals (HVAC & technology technicians), and office staff via either the efficiencies discovered through consolidation and/or rental income from facilities. The efficiencies discovered came through the cultivation of "low-hanging fruit" – in this case the hiring of a permanent, qualified HVAC technician who was able to program and monitor building energy usage whereas the Town lacked the knowledge base before. Through these efforts, the Town of Lexington to date has saved nearly \$500,000 in energy costs over a four year period.³⁶ Continued efficiency has been achieved through the investment in hiring permanent higher-skilled, higher-paid technicians and contracting out lower-skilled, lower-paid maintenance and laborer functions. Simply put, Lexington has achieved an economy of scale through consolidation whereby it made economic

³² Carl Valente, "Department of Public Facilities", Presentation to the Massachusetts Municipal Management Association, 22 October 2009.

³³ Carl Valente, Personal Interview, 10 September 2010.

³⁴ Valente, Presentation.

³⁵ Valente, Interview.

³⁶ Patrick Goddard. Personal Interview. 1 July 2011. It is unclear if similar savings could be achieved in Natick as the Town has a much more robust history of pursuing energy efficiency than Lexington did.



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sense to have a small but dedicated staff of building professionals.³⁷ Overall, however, costs have not reduced but slightly increased (an average of just about 1% annually) over the four budgetary years from FY 2009-FY 2012.

Lexington Department of Facility Management Budget Appropriations – FY 2009-2012				
Budget Year	FY 2009	FY 2010	FY 2011	FY 2012
Appropriation	\$8,698,435	\$8,763,578	\$8,806,225	\$9,037,967

Like Ashland’s experience and the survey results indicate, the primary benefits have been the increased technical skill of staff (and subsequent professionalization of the workforce) and better collaboration within the town concerning capital related projects.³⁸ Budgeting was consolidated from the very beginning (FY 2009) into one line-item budgeting for all expenses under the Department of Public Facilities. The DPF is budgeted under Shared Expenses (just like in Natick, Shared Expenses in Lexington include Employee Benefits, Property Insurance, Debt Service, etc.) and is not subject to the split of annual revenues between Municipal and School budgets.

Lexington learned several lessons from consolidation. The first was the importance of hiring of a talented professional manager to run the department. Town Manager Valente credits much of the success of the Department of Public Facilities in Lexington to the hiring of a professional facilities manager who had the desired skill set necessary for the shared department.³⁹ The second is having in place a carefully spelled out Memorandum of Agreement by which all parties know their respective roles, responsibilities, objectives and goals.⁴⁰ The third lesson was to avoid, if at all possible, having multiple employers for department staff. Although all of the department staff report to the Director of Public Facilities, the schools and municipal building custodians have maintained existing (and separate) collective bargaining agreements which spell out who the employees report to. This has resulted in management issues and is an ongoing concern which will continue to be worked out.⁴¹ The fourth lesson is that facility management is changing, and it requires employees with increased and differing skill sets and the willingness and ability to enhance their skills with evolving technology. This may require increases in salary. Finally, the focus of consolidation should be on quality of service delivery, rather than on cost savings.⁴²

³⁷ Ibid.

³⁸ Goddard, Interview.

³⁹ Valente, Interview.

⁴⁰ Goddard, Interview.

⁴¹ Valente, Interview.

⁴² Goddard, Interview.



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Overall, Lexington has been pleased with the results of consolidation and believes that the goals of consolidation have been achieved.⁴³

Focus On: Milton

The Town of Milton is in the early stages of consolidating Facility Management functions. Over the last couple of years, a consolidation committee spent time evaluating town facility management services. Two definitive conclusions came out of the efforts of that committee. The first was to create the position of a Consolidated Facilities Director, whose responsibilities include the eventual consolidation of municipal and school facility management under his direction.⁴⁴ The second was to settle which departments would be included in the consolidation and which would not.⁴⁵

Since the effort is so new, many of the outcomes of consolidation found in Ashland and Lexington have not been achieved at this time in Milton. For example, the director is currently examining the budgets of the many divisions which manage facilities and will bring forward recommendations to the Town Administrator and Superintendent. As a result, there has been no documentation of savings, efficiencies or economies of scale as a result of consolidation. It is hoped that consolidation of facility management in Milton will produce quantifiable savings through better planned/preventative maintenance, diminished use of contractors over time and centralized procurement functions. The director has also been given the task of negotiating with the various effected unions.⁴⁶

Moving forward, Milton hopes to work through staffing issues and realize two important goals: proper maintenance of Town-owned assets which will result in their use for at least half of a century and achieving the proper investment of dollars into building maintenance to achieve the first goal. Discussions about prioritizing cost savings and material investment in facility management continue.⁴⁷

Focus On: Needham

Needham has the longest history with consolidation, as consolidation of facility management services began in 1994. Prior to consolidation, each respective side (municipal and schools) had

⁴³ Valente, Interview.

⁴⁴ Bill Ritchie, Personal Interview. July 2010.

⁴⁵ Ibid. (Note: At this time, the Milton Cemetery and Recreation and Parks Departments are not participating in consolidation with Facilities Management.)

⁴⁶ Ibid.

⁴⁷ Ibid.



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separate departments which managed facilities independently.⁴⁸ Beginning in 1994, Needham had a governing board (the Municipal Building Management Board or MBMB) consisting of the Town Administrator, School Superintendent, Library Director, DPW Director and Park and Recreation Director to oversee the affairs of the consolidated department. This version of consolidation created a Municipal Building Director and which reported to the MBMB and a separate School Facilities Manager which reported to the Superintendent.⁴⁹ With the creation of a new charter in 2005, that governing board ended. The Municipal Building Director became the Director of Department of Public Facilities and Operations and now reported to the head of only the Department of Public Works. All school staff was placed under the direction of this new director, but nothing else changed. This created problems, as the Director was still serving multiple administrators (DPW Director, Town Administrator, Superintendent, etc.) and communication was lacking which resulted in charges of preferential treatment in service delivery.⁵⁰

The final iteration of consolidation occurred in 2007 where a separate Department of Public Facilities containing two divisions – a Construction Division and an Operations Division – now exists. The Construction Division provides support for the Permanent Public Building Committee (PPBC) and provides advice and support the Town Manager on Facility construction, planning and operational needs⁵¹. Projects over \$500,000 are managed by the PPBC. The Operations Division is responsible for custodial services and provides scheduled and routine maintenance to all Town and School buildings, manages rentals in school gyms and auditoriums. It, like the DPF in Lexington, manages scheduling in all Town buildings. The department is also responsible for managing major building related capital projects and capital improvements with cost under \$500,000.⁵² The division also includes all maintenance trades in support of all Town and School buildings.

The call for consolidation in Needham stemmed from public outcry to better manage all public buildings after the closure of a school building due to delayed maintenance on critical building systems. This event led to further consolidation of facility management and a centralized approach in budgeting, contract management, service delivery, capital planning, and scheduling of all Town-owned buildings. And, with the assistance of software, a comprehensive

⁴⁸ Kate Fitzpatrick, e-mail to Martha L. White, 17 June 2010.

⁴⁹ Chip Laffey. Personal Interview. July 2010.

⁵⁰ Ibid.

⁵¹ Town of Needham – Construction Division. 10 November 2010. <<http://www.needhamma.gov/index.aspx?NID=630>>

⁵² Town of Needham – Operation Division. 10 November 2010. <<http://www.needhamma.gov/index.aspx?NID=950>>



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preventative maintenance program now exists.⁵³ No quantifiable cost savings was supplied by Needham during the interviews, but emphasis was again placed on the improved maintenance of all facilities and ease of centralized scheduling. Staffing has been reduced in the Middle and High Schools through the contracting of cleaning services in those buildings. Existing custodian staffs are being cross trained to function in any building.

The model has been very workable and successful in Needham.⁵⁴

Focus On: Westwood

Like Natick, Westwood has partial consolidation of facility maintenance functions, in the area of field maintenance. The Department of Public Works took over maintenance of fields from the schools. The transition took about five years to complete. Each field was only transferred when it was rebuilt and there was a commensurate budget increase to the DPW budget, without any requirement that the school reduce their budget by the amount of savings they would realize from the shift.⁵⁵

Westwood has discussed combining the maintenance of buildings under the school, but this has not yet been achieved. At this point, Westwood is still under an organizational structure whereby DPW maintains all municipal buildings and the school department maintains school buildings.⁵⁶

Focus On: Wayland

Wayland hired a joint School/Town Public Buildings Director in 2007. Historically, the municipal side had no facility manager whereas the schools did. This position reports jointly to the Town Administrator & the School Superintendent. Wayland noted that a pitfall of the initial consolidation was that no inter-board agreement between the School Committee and the Board of Selectmen was in place at the beginning of consolidation. As a result, the Town struggled for the first two years over jurisdictional matters. Custodians were previously under the jurisdiction of the School's Facilities Department and continue to remain so as part of the joint department.⁵⁷

⁵³ Laffey, Interview.

⁵⁴ Fitzpatrick, E-mail.

⁵⁵ Mike Jaillet, e-mail to Martha L. White, 17 June 2010.

⁵⁶ Ibid.

⁵⁷ John Senchyshyn, e-mail to Martha L. White, 17 June 2010.



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Summary

As is often the case with municipalities, different communities choose to perform the same services in different ways. However, many comparable communities have engaged in some degree of facility management consolidation in recent years, and most with success. The majority of municipalities who responded to the consolidation survey found that the top three results of consolidation were:

- 1) Increase in the quality and breadth of professional facility management staff.
- 2) Savings and efficiencies in 'aggregate construction and renovation projects'.
- 3) Improved coordination of staff, equipment and resources which in turn improved daily maintenance quality.⁵⁸

Other results included the ability to more nimbly use resources to address new problems, make better design decisions for new facilities, system-wide improvement in preventative maintenance and improved equipment purchases and use.⁵⁹

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⁵⁸ Rourke, Survey Summary.

⁵⁹ Ibid.



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Section V: Alternatives

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Consolidation of Facility Management Functions



Section V: Alternatives

Natick has a long history of evolving its governmental structures and services to provide for greater efficiency and better customer service. This report has demonstrated that there are other models available to the Town to consider with respect to its delivery of facility management; specifically, that the municipal and schools facility management functions be combined. In earlier versions of this report, three possible alternatives were listed as options to consider regarding the facility management services in the Town of Natick. They included:

Scenario I: Consolidation of Facility Management Functions

Scenario II: Partial Consolidation of Facility Management Functions

Scenario III: Contracting/Privatizing Functions

Based on our research and other communities' successes, Scenario III does not warrant further consideration at this time. Rather, it should be considered complementary to either of the first two alternatives of consolidation. Utilization of private contractors in some forms of facility management already exists – thus to utilize contracted services more or less would not dramatically change or enhance the existing service delivery model.

Scenario II was considered in the last iteration if either a) “low-hanging fruit” appeared readily available to administration and policymakers and/or b) a significant stumbling block was discovered which would seriously hamper any effort to consolidate. Given that neither of these limitations presents themselves and the experience of other communities indicates that it is best not to consolidate in a piece-meal fashion; Scenario II is not being further proposed at this time.

This leaves Scenario I: Consolidation of Facility Management Functions as the recommendation of Town Administration.

Scenario I: Consolidation of Facility Management Functions

This scenario would create a consolidated and distinct Department of Facility Management, responsible for all building and facility maintenance and operation, repair and management of mechanical and trades functions (painting, plumbing, electrical, HVAC and security components of Town-owned buildings) and administration of town-owned leased properties, energy and building-related (including capital) procurement.⁶⁰

Staffing

⁶⁰ Note: It would also be responsible for some form of telecommunications management related to “Smart” building technologies. It would not manage fields and grounds (effectively the services provided by the Land, Facilities and Natural Resources Division of the Department of Public Works) at this time. After surveying other communities, and given the fact that the function of fields maintenance is already consolidated, further consolidation did not seem necessary at this time.

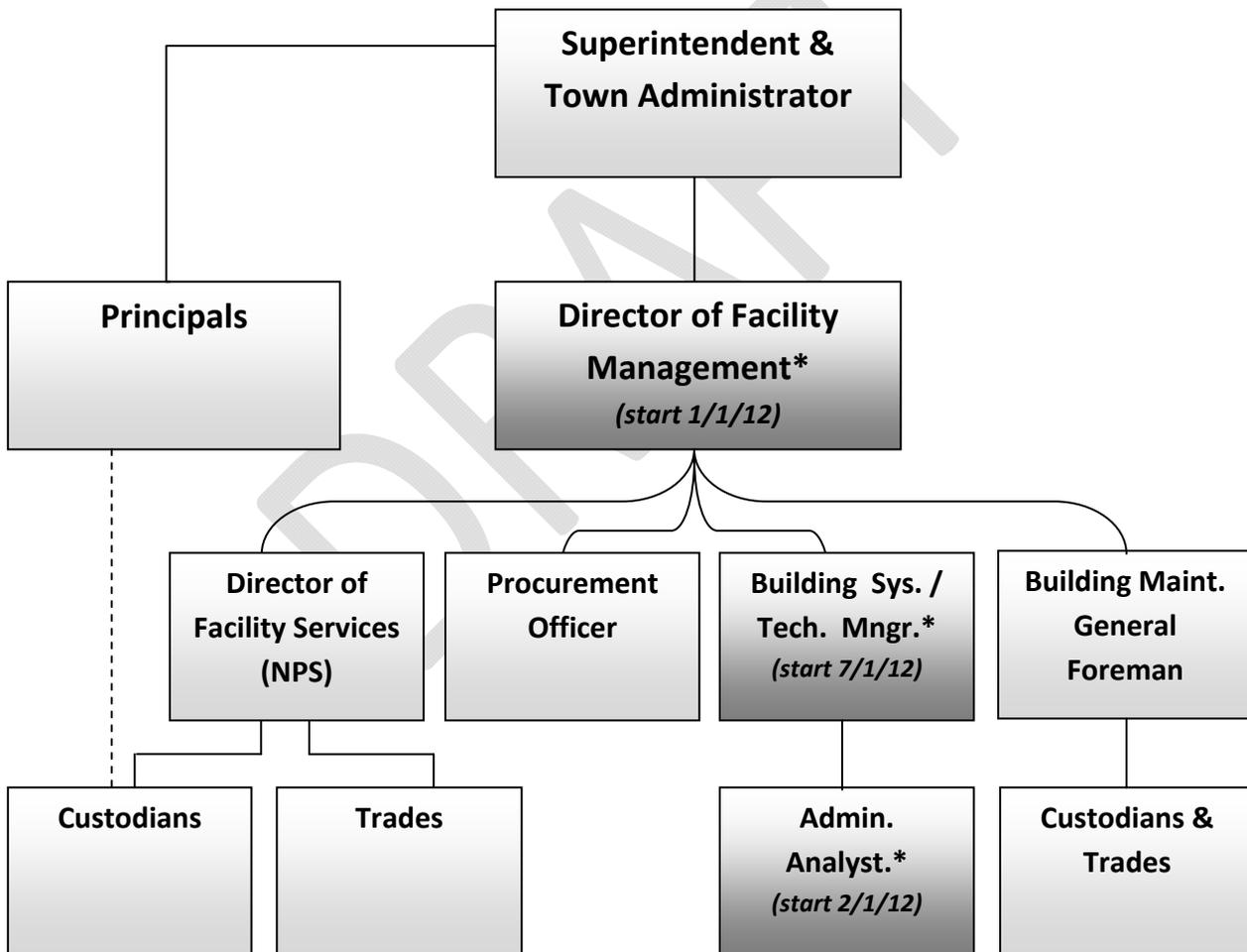


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A new Director of Facility Management, answerable to both the Town Administrator and the Superintendent of Public Schools, would oversee this department. All personnel currently employed by the School Facility Services Department and the Building Maintenance Division of the Department of Public Works would report to him or her. School Facility Services and Municipal Building Maintenance employees would be placed within this department. . Operationally, custodial and trades staff would report to their current supervisors who would, in turn, report to the Director of Facility Management. In addition, all procurement functions (and the Municipal Procurement Officer) would be consolidated under this new department but remain available to all Town departments (including the school department).

Proposed Organizational Chart – Department of Facility Management



**Signifies new positions*



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Other facility maintenance, specifically infrastructure maintenance (field maintenance, water, sewer & highways), would remain under the purview of the Department of Public Works. This would also remain true for snow plowing, with the exception that many employees of the new Department of Facility Maintenance would continue to perform their current plowing and shoveling responsibilities in the case of a snow event.

Budget

The proposed consolidated budget for a new Facility Management Department has been derived from the FY 2012 Appropriated Budget as submitted to Town Meeting for the Natick Public Schools, and the Building Maintenance and Energy Divisions of the Department of Public Works. In order to achieve the implementation of this new department, a phased approach to hiring new staff is proposed. An additional \$75,833 would be required in FY 2012 to hire a Director of Facility Management for one-half of FY 2012 and an Administrative Analyst for five months of FY 2012. Starting FY 2013, we anticipate a third position would be added in the form of a Building Systems/Technical Manager capable of mastering the new building systems in the High School and the Community/Senior Center and responsible for training existing staff on how to maintain those systems.

DRAFT Consolidated Budget	2011		2012		2013	2012 vs. 2013	
	Appropriated		Spring ATM	Fall ATM		Projected	\$
School Personnel	\$ -	\$ -	\$ -	\$ 1,824,197	\$ 1,869,802	\$ 45,605	2.5%
Municipal Personnel	\$ -	\$ -	\$ -	\$ 399,309	\$ 409,292	\$ 9,983	2.5%
Shared Personnel	\$ -	\$ -	\$ -	\$ 75,833	\$ 252,750	\$ 185,250	274.4%
Personnel Services	\$ -	\$ -	\$ -	\$ 2,299,339	\$ 2,531,844	\$ 240,838	10.5%
School Repairs	\$ -	\$ -	\$ -	\$ 462,000	\$ 462,000	\$ -	0.0%
Municipal Repairs	\$ -	\$ -	\$ -	\$ 312,000	\$ 312,000	\$ -	0.0%
Purchase of Services	\$ -	\$ -	\$ -	\$ 774,000	\$ 774,000	\$ -	0.0%
Custodial Services - School	\$ -	\$ -	\$ -	\$ 115,000	\$ 115,000	\$ -	0.0%
Contractual Svs - Cleaning	\$ -	\$ -	\$ -	\$ 95,800	\$ 100,000	\$ 4,200	4.4%
Custodial Supplies	\$ -	\$ -	\$ -	\$ 40,000	\$ 40,000	\$ -	0.0%
Tech/Professional Services	\$ -	\$ -	\$ -	\$ 250,800	\$ 255,000	\$ 4,200	1.7%
Electric	\$ -	\$ -	\$ -	\$ -	\$ 1,423,972	\$ 67,808	5.0%
Natural Gas & Heating Oil	\$ -	\$ -	\$ -	\$ -	\$ 859,450	\$ -	0.0%
Gasoline	\$ -	\$ -	\$ -	\$ -	\$ 579,750	\$ 115,950	25.0%
Street & Holiday Lighting	\$ -	\$ -	\$ -	\$ -	\$ 227,885	\$ (59,815)	-20.8%
Energy	\$ -	\$ -	\$ -	\$ -	\$ 3,091,057	\$ 123,943	4.2%
Total Consolidated Budget	\$ -	\$ -	\$ -	\$ 3,324,139	\$ 6,651,901	\$ 368,981	5.9%

Please note: An additional \$10,083 in FY 2012 and \$33,000 in FY 2013 is necessary to cover anticipated benefit costs for new positions. This means the total amount in new money needed for **FY 2012 is \$85,916 and for FY 2013 is \$285,750.**



Town of Natick

Facilities Management Study

The Facility Management Department would be entirely budgeted as a Shared Expense – meaning it would be appropriated by Town Meeting separately from the Natick Public Schools or Department of Public Works budgets – similar to how Health Benefits, Property Insurance and Debt Service is currently budgeted.

Administration would recommend this budget be appropriated in two installments – the first would be to move existing School and Municipal Personnel and create new personnel funding for the Director and Admin. Analyst position at the 2011 Fall Annual Town Meeting so that the new Department is in effect starting January 1st. The second installment would be to move the energy budgets out of the respective school and municipal budgets at the 2012 Spring Annual Town Meeting effective July 1st. A preliminary analysis as to how this would impact the Natick Public Schools Budgets and the Department of Public Works budgets is detailed on the ensuing pages.

Budgetary Impacts – School and Municipal Budgets

The proposed transitional budget for the Natick Public Schools is shown below. Items to be transferred are shaded. *Any assumptions for FY 2013 are merely that – simply assumptions which may or may not come to pass for other sections of the schools and municipal budgets.*



Town of Natick

Facilities Management Study

DRAFT Natick Public Schools Revised Budget

Compensation	2011	2012	2012	2013	2012 vs. 2013	
	Appr.	Spring ATM	Fall ATM	Projected	\$	%
District. Leader. & Admin.	2,165,632	2,332,156	2,332,156	2,390,460	58,304	2.5%
Instructional Services	31,521,044	32,584,229	32,584,229	33,398,835	814,606	2.5%
Student Services	1,331,644	1,382,456	1,382,456	1,417,017	34,561	2.5%
Operations & Maintenance	1,761,192	1,824,197	0	0	0	#DIV/0!
Personnel Services	36,779,512	38,123,038	36,298,841	37,206,312	907,471	2.5%
Expenses	2011	2012	2012	2013	2012 vs. 2013	
	Appr.	Spring ATM	Fall ATM	Projected	\$	%
District. Leader. & Admin.	749,776	768,128	768,128	783,491	15,363	2.0%
Instructional Services	1,489,905	1,676,715	1,676,715	1,760,550	83,836	5.0%
Student Services	2,270,754	2,536,094	2,536,094	2,662,899	126,805	5.0%
<i>Custodial Services (4110)</i>	115,000	115,000	0	0	0	#DIV/0!
<i>Fuel for heating of buildings (4120)</i>	740,000	691,250	691,250	0	(691,250)	-100.0%
<i>Electricity (4130)</i>	870,000	782,464	782,464	0	(782,464)	-100.0%
<i>Telephone (4140)</i>	75,000	75,000	75,000	75,000	0	0.0%
<i>Building Repairs (4220)</i>	462,000	462,000	0	0	0	#DIV/0!
<i>Vehicle Maintenance Other (4230)</i>	8,000	8,000	0	0	0	#DIV/0!
<i>Network and Telecommunications (4400)</i>	197,592	184,062	184,062	193,265	9,203	5.0%
Sub-total Operations & Maintenance	2,467,592	2,317,776	1,732,776	268,265	(1,464,511)	-84.5%
Employer Retirement Contributions	93,162	89,980	89,980	94,479	4,499	5.0%
Insurance for Active Employees	66,381	64,114	64,114	67,319	3,206	5.0%
Community Services	196,715	189,997	189,997	199,497	9,500	5.0%
Programs with Other School Districts	5,281,530	5,810,877	5,810,877	6,391,965	581,088	10.0%
Expenses	12,615,815	13,453,681	12,868,681	12,228,465	(640,216)	-5.0%
Total Gross Appropriations - Natick Budget Schools	49,395,327	51,576,719	49,167,522	49,434,777	267,255	0.5%
Offsets						
<i>Less: Town Transportation Subsidy</i>	(320,522)	(330,137)	(330,137)	(340,041)	(9,904)	3.0%
<i>Less: Bus Fee Offset</i>	(260,000)	(270,000)	(270,000)	(270,000)	0	0.0%
<i>Less: Circuit Breaker Offset</i>	(960,023)	(1,959,598)	(1,959,598)	(1,959,598)	0	0.0%
<i>Less: EDUJobs Grant/Offset</i>		(518,585)	(518,585)			
<i>Less: Federal and State Grants</i>	(2,166,243)	(2,092,261)	(2,092,261)	(1,569,196)	523,065	-25.0%
<i>Less: ARRA Offset</i>	(1,305,722)	0	0	0	0	#DIV/0!
Total Offsets	(5,012,510)	(5,170,581)	(5,170,581)	(4,138,835)	1,031,746	-20.0%
Total Net Appropriations - Natick Public Schools	44,382,817	46,406,138	43,996,941	45,295,943	1,299,002	3.0%

Shading indicates major line-items where money would be removed from the Natick Public Schools Budget and added to the new Department of Facility Management.



Town of Natick

Facilities Management Study

DRAFT Department of Public Works Revised Budget

	2011 Appropriated	2012 Spring ATM	2012 Fall ATM	2013 Projected	2012 vs 2013	
					\$	%
DPW Administration						
Salaries	\$ 172,648	\$ 235,046	\$ 235,046	\$ 240,922	\$ 5,876	2.50%
Expenses*	\$ 41,565	\$ 44,620	\$ 44,620	\$ 119,712	\$ 75,092	168.29%
Total DPW Administration	\$ 214,213	\$ 279,666	\$ 279,666	\$ 360,635	\$ 80,969	28.95%
DPW Building Maintenance						
Salaries	\$ 386,043	\$ 329,505	\$ -	\$ -	\$ -	#DIV/0!
Expenses	\$ 462,500	\$ 449,900	\$ -	\$ -	\$ -	#DIV/0!
Total DPW Build. Maint.	\$ 848,543	\$ 779,405	\$ -	\$ -	\$ -	#DIV/0!
DPW Energy						
Purchase of Services	\$ 1,425,000	\$ 1,491,900	\$ 1,491,900	\$ -	\$ (1,491,900)	-100.00%
Other Charges	\$ 1,000	\$ 1,500	\$ 1,500	\$ -	\$ (1,500)	-100.00%
Total DPW Energy	\$ 1,426,000	\$ 1,493,400	\$ 1,493,400	\$ -	\$ (1,493,400)	-100.00%
DPW Engineering						
Salaries	\$ 363,062	\$ 376,517	\$ 376,517	\$ 385,930	\$ 9,413	2.50%
Expenses	\$ 99,900	\$ 100,200	\$ 100,200	\$ 102,204	\$ 2,004	2.00%
Total DPW Engineering	\$ 462,962	\$ 476,717	\$ 476,717	\$ 488,134	\$ 11,417	2.39%
DPW Equipment Maintenance						
Salaries	\$ 495,647	\$ 510,190	\$ 510,190	\$ 522,945	\$ 12,755	2.50%
Expenses	\$ 264,400	\$ 266,850	\$ 266,850	\$ 272,187	\$ 5,337	2.00%
Other - Capital Outlay	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ -	0.00%
Total DPW Equip. Maint.	\$ 760,047	\$ 782,040	\$ 782,040	\$ 800,132	\$ 18,092	2.31%
DPW Highway & Sanitation						
Salaries	\$ 1,237,051	\$ 1,280,190	\$ 1,280,190	\$ 1,312,195	\$ 32,005	2.50%
Expenses	\$ 374,450	\$ 389,450	\$ 389,450	\$ 397,239	\$ 7,789	2.00%
Other - Charges & Expenditures	\$ 1,378,825	\$ 1,457,700	\$ 1,457,700	\$ 1,486,854	\$ 29,154	2.00%
Total DPW Highway & San.	\$ 2,990,326	\$ 3,127,340	\$ 3,127,340	\$ 3,196,288	\$ 68,948	2.20%
DPW Land, Facilities & Nat. Resources						
Salaries	\$ 436,464	\$ 449,961	\$ 449,961	\$ 461,210	\$ 11,249	2.50%
Expenses	\$ 161,200	\$ 219,881	\$ 219,881	\$ 224,279	\$ 4,398	2.00%
Total DPW LF & NR	\$ 597,664	\$ 669,842	\$ 669,842	\$ 685,489	\$ 15,647	2.34%
Total Public Works	\$ 7,299,755	\$ 7,608,410	\$ 6,829,005	\$ 5,530,677	\$ (1,298,328)	-19.01%

Shading indicates major line-items where money would be removed from the Department of Public Works Budget and added to the new Department of Facility Management.

*Increase in Administration expenses is the shift of streetlight & holiday lighting maintenance costs out of the energy budget.

In addition, the Procurement Officer would be removed from the Comptroller's Budget and transferred to the new Facility Department budget at the 2011 Fall Annual Town Meeting, (effective January 1, 2011). All budgetary transfers at the upcoming Fall Town Meeting would be made under the FY 2012 Omnibus Reconciliation article (Article 4).



Town of Natick

Facilities Management Study

Legal Approval

The consolidation of departments in this case is a four-step process.

- 1) First, the School Committee must follow the action of the 2010 Fall Annual Town Meeting and adopt M.G.L. Ch. 71, Sec. 37M which allows for the consolidation of departments between school districts and general government within the Commonwealth of Massachusetts. (A copy is provided in Section VII: Appendices)
- 2) Second, the Board of Selectmen and the School Committee need to agree to a Memorandum of Agreement which clearly and deliberately outlines the new organization to be created, its responsibilities and who is responsible for what. (A draft is provided in Section VII: Appendices)
- 3) Third, Town Meeting must, as per Article 6 of the Town's Charter, vote to reorganize the Department of Public Works through the removal of the Building Maintenance Division and placing it with the School Facility Services Department as their operations are consolidated within a new Department of Facility Management. We might also include in this vote the re-assignment of the Procurement Officer
- 4) Fourth, at a later Town Meeting, as per Article 6 of the Town's Charter, vote to reorganize the Department of Public Works through the removal of the Municipal Energy Division and placing it within the Department of Facility Management.

A timeline for these and other proposed actions is included in the ensuing Section VI.

Rationale

Please note: the following section is written with the assumption that the Study Committee approved a set of goals. The report will be further modified as the goals are further refined, however they were approved as of September 20th.

Consolidation of Facility Management services between the Natick Public Schools and the Department of Public Works is the logical outcome of this study and the goals set forth by the Facility Management Study Committee. To review the committee's goals:



Town of Natick

Facilities Management Study

1) Improve the quality and value of services delivered to facility users, taxpayers and related constituents

A consolidated facility management department has repeatedly shown to improve the utilization of all town resources for building and facility maintenance and management in other communities.⁶¹ The current disparate approach is not working in all cases (namely in the areas of municipal capital planning & asset retention and future capital needs). Work order systems are established but do not interact between the Municipal Departments and Schools. Maintenance Mechanics who are more trained to handle a variety of tasks in the School department could be leveraged on the Town side, but currently are not. Town Administration believes this is the best way to provide accountability to citizens through standardization of metrics and methods of facility management and the creation and implementation of customer surveys to measure satisfaction across all Town-owned buildings.

2) Maximize the lifespan of Town-owned assets

Capital planning on the municipal side is lacking within the realm of Facility Management. Although the Town has made strides in its investment into capital assets of all kinds in the last several years, the debt exclusion overrides which added \$90 million of new capital assets to the community highlight the need to ensure that assets are protected and properly cared for to maximize their useful life and protect the taxpayer's investment. Evidence from other communities has shown that the addition of facility management professionals greatly enhances the opportunities to properly plan and care for all building facilities in a proactive way, and ensure that the faith the public has placed in its facilities' caretakers is well founded. Currently, under the decentralized approach to facility management, no concrete plans for the operation and management of new systems within the new buildings is in place. Consolidation at this time provides the opportunity to ensure the Town has the right personnel to maximize the life and use of Town-assets and prevent costly repairs or construction before it should be necessary.

⁶¹ Rourke, Survey.



3) Achieve operational efficiency and/or cost reduction relating to Town facility management

One of the first goals of any consolidation is to save money. One of the repeated findings from the interviews and surveys taken to research this report is that cost savings should not be a driving force behind consolidation.⁶² That being said, Town Administration fully expects that consolidation will lead to efficiencies of scale which will produce cost savings in the medium to long term.

Consolidation will not produce initial quantitative cost savings. In fact, it will result in cost increases through the addition of new personnel in the form of a Director, an Administrative Analyst as well as the likely addition of a Building Systems Technical Manager or similar position. The desired outcome is that through centralization, a unified operating and capital budgeting process can be undertaken which, over time, will produce efficiencies and cost savings. We anticipate that these savings can come from numerous areas – consolidated purchasing, resulting in better overall pricing for goods and services; combining bidding on capital and trade contracts, allowing for reduced cost through better pricing; elimination of costly contract services at prevailing wages by bringing such trades “in-house”; bulk buys on energy, resulting in lower energy costs for the entire Town – just to name a few. With a thorough review of all Town Facility Management services under one Director, more efficiencies and savings will inevitably result.

4) Establish and demonstrate an effective process for collaboration (between General Government and School System, in this case)

This is a process which began with the call to examine Town processes first highlighted by the Expense Control Task Force in 2009. Town Administration has provided further research in this and other areas of municipal services and provided the Board of Selectmen recommendations for policy changes. The advent of the joint Facility Management Study Committee, comprised of municipal policymakers (namely the Board of Selectmen) and school policymakers (namely the School Committee) has created an excellent starting framework for future collaboration between different but united entities within the Town of Natick. This Committee began meeting in January 2011 and spent the ensuing months researching and exploring consolidation options for

⁶² Ibid.



Town of Natick

Facilities Management Study

Facility Management and collectively discussed concerns and opportunities. It is hoped that this process can serve as a model for the Board of Selectmen and the School Committee to work collaboratively together in the future for the benefit of all Natick citizens.

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Town of Natick

Facilities Management Study

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**Section VI:
Recommendations & Next Steps**

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Section VI: Recommendations & Next Steps

Overall Recommendation(s):

Town Administration has the following recommendations as a result of this study:

- 1) **That the Board of Selectmen and the School Committee enter into a Memorandum of Agreement creating a new Department of Facility Management.**
- 2) **That the Board of Selectmen, School Committee and Town Meeting support the subject matter of Article 2 of the 2011 Fall Annual Town Meeting creating the Department of Facility Management and the reorganization of the Department of Public Works, as well as the associated budgetary changes that will be proposed under Article 4 of the 2011 Fall Annual Town Meeting.**

Next Steps:

The next steps which staff recommends be taken in this study are:

Week of September 19th – Study Committee review/approval of Final Report and recommendations to Board of Selectmen and School Committee

September 27 – Joint public hearing by Selectmen and Finance Committee

October 18th – 2011 Fall Annual Town Meeting begins

November-January 1st – Assuming favorable passage of consolidation by Town Meeting, recruitment of Facility Management Director, construction of preliminary FY 2013 budget for Facility Management Department, development of FY 2013 School & Municipal budgets with facilities and energy components removed from them, begin recruitment of Administrative Assistant position.

January 1 – Start date for new Director of Facility Management

January – February – Director finalizes recruitment of Administrative Analyst position. Director assesses existing operations and capabilities and identifies how to best address needs; refines the FY 2013 budget accordingly.

February 1st – Start Date for Administrative Analyst

February – March – Review of FY 2013 Facility Budget by Finance Committee

June 1st – Begin recruitment of new position(s) e.g. Building Systems/Technical Manager Start Date for new position(s)

July 1st – Begin FY 2013 and fully consolidated Department of Facility Management



Town of Natick

Facilities Management Study

Section VII: Appendices

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Bibliography

Facility Consolidation Study Committee Goals

Facility Consolidation Study Committee Questionnaire

Summary of Natick Building Systems

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Town of Natick

Facilities Management Study

Appendices:

Facility Consolidation Study Committee Goals

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Facilities Management Study Committee

As voted unanimously on September 20, 2011

Strategic Goals

- Improve the quality and value of services delivered to facilities users, taxpayers and related constituents
- Maximize the lifespan of Town-owned assets
- Achieve operational efficiencies and, where possible, cost efficiencies relating to Town facilities management
- Establish and demonstrate an effective process for collaboration (between General Government and School System, in this case)



Town of Natick

Facilities Management Study

Appendices:

Facility Consolidation Study Committee Questionnaire to Comparable Communities

DRAFT

Natick is evaluating the advantages and disadvantages of consolidating its school and town facilities management departments. We understand that your town has either completed consolidation of, or is in the process of consolidating, these departments, and we hope to learn from your successes and disappointments. Would you be willing to talk with a group of individuals from Natick about your process and outcome? We could talk in person or by phone, whichever you prefer. The individuals representing Natick in the discussion will include a Selectman, a School Committee member, and perhaps 1 or 2 senior staffers.

We would ask you the following questions. Based on your answers, we might wish to delve further into some topics.

- 1) What was the organizational structure of your town/school facilities departments before the consolidation? What does it look like now?
- 2) Is your consolidation of town/school facilities management departments complete, or do you plan further consolidation in the near (or far) future? What is the total elapsed time you expect all steps of the consolidation will take?
- 3) How have you "staged" the consolidation - what came first, what will be done last? Has any stage been particularly difficult to date?
- 4) What are the compelling reasons for consolidating school and town facilities management in your town?
- 5A) How are facilities operating budget decisions made under the consolidated structure? How were they made prior to consolidation?
- 5B) How are facilities capital allocation decisions made under the consolidated structure? How were they made prior to consolidation?
- 6) What have been the major advantages and disadvantages of consolidation? What were the expected benefits prior to the consolidation and have they been achieved?
- 7) Have costs for repairs and maintenance increased or decreased with the consolidation? Please be quantitative in both dollars and percentages of costs, if possible. If these costs have increased, why?
- 8) With the consolidation, have any activities or responsibilities been outsourced, moved to other departments (outside of facilities management) or eliminated? Have internal positions been added where previously the work was outsourced? (e.g., a plumber has been hired, janitorial work is now contracted out.)
- 9) Do you have one facilities management director for both town and school buildings? If so, could we obtain a copy of this position's official job description?
- 10) Do you utilize one centralized system for scheduling usage of rooms and buildings? Do you utilize one centralized system for job/repair management?
- 11) Are there other aspects, pitfalls, etc. that you think we should consider?

Someone from Natick will call or email you to schedule a time to talk, either in person or by phone. Thank you for being willing to let us learn from your experience.



Town of Natick

Facilities Management Study

Appendices:

Summary of Natick's Building Systems

DRAFT

Town of Natick Building Systems Summary

	#	% of buildings
Overall		
Total Number of Buildings/Properties Managed & Maintained	34	
- Municipal Buildings/Properties	26	
- School Buildings/Properties	8	
Total Square Footage of all Buildings	1,160,943	
- Municipal Square Footage	387,943	
- School Square Footage	773,000	
Utility Consumption (annual)		
- Electric (kWH)	8,245,653	
- Natural Gas (therms)	308,919	
- Heating Oil (gallons)	195,412	
- Water* (HCF) *(partial - Municipal only)	4,916	
Building Systems		
Climate		
- Heat		
Oil	8	24%
Gas	19	56%
None	5	15%
Other	2	6%
- Air Conditioning		
Central Unit	14	41%
Unit	11	32%
None	9	26%
- Digital Controls (DDC) (Y/N)	14	41%
Electric		
Single Phase	12	35%
Three-Phase	13	38%
Unknown	9	26%
Solar Systems (# of buildings which <u>have</u> systems)	1	3%
Security Systems (# of buildings which <u>have</u> systems)	20	59%
Windows		
Excellent	6	18%
Good	13	38%
Fair/Average	9	26%
Poor	6	18%
Roof		
Excellent	7	21%
Good	10	29%
Fair	16	47%
Poor	1	3%
Fire Suppression/ Sprinklers (# of buildings which have Sprinklers)	16	47%
ADA Accessible (# of Buildings)	17	50%
Users		
Individuals in all School Buildings (average daily)	5973	
Average Hours of Operation (schools) (daily)	12.5	

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.	Heating System	DDC? (Y/N)	Security System?	Electrical System
Bennett Hemenway Elementary School	22 East Evergreen Road	1998	80,000	56000	hot water by oil	Y	Y	Y
Brown Elementary School	1 Jean Burke Drive	1975	54,000	37800	hot water by gas	Y	Y	Y
Johnson Elementary School	105 South Main Street	1940	26,000	18200	steam by oil	Y	Y	Y
Kennedy Middle School	Trevor Lane	1965	106,000	74200	steam by oil	partial	Y	Y
Lilja Elementary School	41 Bacon Street	1990	54,000	37800	hot water by gas	Y	Y	Y
Memorial Elementary School	97 Eliot Street	1960	65,000	45500	hot water by oil	Partial	N	Y
Natick High School (old)	124 Pond Street	1954	293,000	205100	steam by oil	N	Y	Y
Natick High School (new)	TBD	2012	254,000	177800	hot water by gas	Y	Y	Y
Wilson Middle School	22 Rutledge Street	2004	134,000	93800	hot water by gas	Y	Y	Y
Total - inclusive of NEW Natick High School			773,000	541,100				

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.
Bennett Hemenway Elementary School	22 East Evergreen Road	1998	80,000	56000
Brown Elementary School	1 Jean Burke Drive	1975	54,000	37800
Johnson Elementary School	105 South Main Street	1940	26,000	18200
Kennedy Middle School	Trevor Lane	1965	106,000	74200
Lilja Elementary School	41 Bacon Street	1990	54,000	37800
Memorial Elementary School	97 Eliot Street	1960	65,000	45500
Natick High School (new)	TBD	2012	254,000	177800
Wilson Middle School	22 Rutledge Street	2004	134,000	93800
Total - inclusive of NEW Natick High School*			773,000	541,100

Old Natick High School had 293,000 Gross Sq. Ft. (approx. 205,100 Net Sq. Ft.)

Windows (age/condition)	Roof (age/condition)	Sprinklers?	ADA Accessible?	A/C?	Number of Levels	Number of Rooms	Hours of Use	Average Daily # of Users
1999/ excellent	1999/ excellent	Y	Y	20%	2	30	7am-9:30pm	711
1995/ Good	1995/ fair	Y	Y	10%	1	24	7am-9:30pm	481
1949/ poor	2005/ excellent	Y	N	1%	2	14	7am-4:30pm	297
1965/ poor	2009/ excellent	N	Y	20%	2	40	7am-9:30pm	671
1997/good	1997/good	Y	Y	10%	1	24	7am-9:30pm	551
1970/poor	2010/ excellent	N	Y	30%	1	26	7am-9:30pm	498
1954/poor	1954/poor	N	N	0	2	91	7am-10:30pm	1760
2012/ excellent	2012/ excellent	Y	Y	100%	3			
2003/ excellent	2003/ excellent	Y	Y	40%	2	56	7am-9:30pm	1004

Technology Systems (Describe) (Describe what tech. helps run the building systems)	Solar?	Other?	Utility Consumption				Personnel Assigned (number of personnel or service contracted)
			Electric (kWh)	Gas (Therms)	Heating Oil	Water (HCF)	
Steafa DDC	N		518,496	0	15,835	N/A	Custodians=3.5
Yankee Tech/ALC system	N		271,440	23,932		N/A	Custodians=2.5
Yankee Tech/ALC system	N		54,600	897	15,322	N/A	Custodians=1.5
Yankee Tech/ALC system	N		466,800	52,140		N/A	Custodians=3.0
Yankee Tech/ALC system	N		336,720	26,100		N/A	Custodians=2.5
Yankee Tech/ALC system	N		194,060	2,878	15,180	N/A	Custodians=2.5
Pneumatic	N		1,366,000	17,321	125,452	N/A	Custodians=11.5
Yankee Tech/ALC system	Y					N/A	
Yankee Tech/ALC system	N		725,310	39,756		N/A	Custodians=4.0

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.	Heating System	DDC? (Y/N)	Security	Electrical System	Windows	Roof
Cole Recreation Center	179 Boden	1956	24,850		Gas Boiler	N*	Y	Single Phase	Good	Exc
Community Senior Center*	115 East Central Street	1950	24,332		Gas Boiler/RTU	Y	Y	3 Phase	61/Poor	Avg
Recycling Center	251 South Main Street	1980	2,448		Unit Heat	N	N	Single Phase	Avg	Avg
DPW Administration	75 West Street	1970	36,096		RTU/Unit	N	Y	3 Phase	Avg	Poor
DPW Vehicle Service	75 West Street	1973	35,420		RTU/Unit	N	Y	3 Phase	21/Avg	Avg
Fire Station 3	2 Rhode Island Avenue	1958	3,222		Gas Boiler	N	N	Single Phase	Good	Avg
Fire Station 2	210 Union Street	1950	2,050		Gas Boiler	N	N	Single Phase	Good	Avg
Fire Station 4	268 Speen Street	1956	4,882		Gas Boiler	N	N	Single Phase	Good	Avg
Gravel Pit/Salt Shed	Oak St	1995	7,680		None	N	N	Single Phase	Good	Avg
LFNR Garage	West Street	1980	750		Oil Hot Air	N	N	3 Phase	Avg	Avg
Bacon Free Library	56 Eliot Street	1880	5,499		Oil Boiler	N	?	?	Avg	Avg
Morse Institute Library	14 East Central Street	1997	60,680		Gas Boiler/RTU	Y	Y	3 Phase	Exc	Avg
Police & Fire Headquarters	20 East Central Street	1998	53,970		Gas Boiler/RTU	Y	Y	3 Phase	11/Exc	11/Good
Town Hall	13 East Central Street	1998	31,741		Gas Boiler/RTU	Y	Y	3 Phase	11/Exc	11/Good
East School	90 Oak Street	1950	24,869		Oil Boiler	Y	Y	Single Phase	Poor	Avg
Total			318,489							

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.	Heating System	DDC? (Y/N)	Security	Electrical System	Windows	Roof
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1996	2,784		Gas Boiler	N	Y	3 Phase	Good	Good
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1906	4,674		Gas Boiler	N	Y	3 Phase	Good	Good
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1960	1,124		Gas Boiler	N	Y	3 Phase	Good	Good
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	2005	5,288		Gas Boiler	N	Y	3 Phase	Good	Good
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	2005	3,920		Gas Boiler	N	Y	3 Phase	Good	Good
Total			17,790							

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.	Heating System	DDC? (Y/N)	Security	Electrical System	Windows	Roof
Eliot School	5 Auburn Street	1938	14,014		Gas Boiler	N	N	Single Phase	Poor	Good
William L. Chase Arena	75 West Street	1970	32,508		Gas Boiler	Y	N	3 Phase	Avg	Avg
Total			46,522							

Facility Name	Address	Year Built	Gross Sq. Ft.	Net Sq. Ft.	Heating System	DDC? (Y/N)	Security	Electrical System	Windows	Roof
JJ Lane Park	Speen St	1995	270		None	N	N	Single Phase	Avg	Avg
Memorial Beach Building	West St	1980	2,160		None	N	N	Single Phase	Avg	Avg
Camp Arrowhead	Worcester Rd	1980	2,064			N		Single Phase	Good	Good
Camp Mary Bunker	Megonko Rd	1995	648			N	N	Single Phase	Avg	Avg
Total			5,142							

Total Building Square Footage 387,943

Facility Name	Sprinklers?	ADA	A/C?	Number of	Number of	Hours of Use	Average Daily # of
Cole Recreation Center	N	Y	Y	1		7:00 - 10:00	
Community Senior Center*	N	Y	Y	1		M-TH 8:00-11:00, F 8:00 - 6:00	
Recycling Center	N	N	N	1		Tue - Sun 7:00 - 3:30	
DPW Administration	Y	Y	Y	2		24/7	
DPW Vehicle Service	Y	N	N	2		24/7	
Fire Station 3	N	N	Unit	1		24/7	
Fire Station 2	N	N	Unit	2		24/7	
Fire Station 4	N	N	Unit	2		24/7	
Gravel Pit/Salt Shed	N	N	N	1		24/7	
LFNR Garage	N	N	N	1		M-F 7:00 - 4:00	
Bacon Free Library	N	N	Y	3			
Morse Institute Library	Y	Y	Y	3		5 Sun. 2-5	3,100
Police & Fire Headquarters	Y	Y	Y	2		24/7	
Town Hall	Y	Y	Y	3		M-TH 8:00-11:00 ,F 8:00 - 6:00	
East School	N	Y	Unit	1		M-TH 8:00-11:00, F 8:00 - 6:00	
Total							

Facility Name	Sprinklers?	ADA	A/C?	Number of	Number of	Hours of Use	Average Daily # of
Water Treatment - Springvale Facilities	Y	N	Y	2		24/7	
Water Treatment - Springvale Facilities	Y	N	Y	1		24/7	
Water Treatment - Springvale Facilities	Y	N	Y	1		24/7	
Water Treatment - Springvale Facilities	Y	N	Y	1		24/7	
Water Treatment - Springvale Facilities	Y	N	Y	1		24/7	
Total							

Facility Name	Sprinklers?	ADA	A/C?	Number of	Number of	Hours of Use	Average Daily # of
Eliot School	N	N	N	1			
William L. Chase Arena	N	Y	Y	1			
Total							

Facility Name	Sprinklers?	ADA	A/C?	Number of	Number of	Hours of Use	Average Daily # of
JJ Lane Park	N	N	N	1		Seasonal	
Memorial Beach Building	N	Y	N	1		Seasonal	
Camp Arrowhead	N	Y	N	1		Seasonal	
Camp Mary Bunker	N	N	N	1		Seasonal	
Total							

Total Building Square Footage

Facility Name	Technology Systems (Describe)	Solar?	Other?	Utility Consumption			
Cole Recreation Center		N	N	101,323	11,849	-	109
Community Senior Center*		N	N	152,440	17,315	-	193
Recycling Center		N	N	11,053		-	-
DPW Administration	DPW Radio Communications Center, Wash Bay	N	N	312,360	6,375	-	376
DPW Vehicle Service	Vehicle Lifts, Tire Machine, Service Bays, Air Compressor	N	N	*shared	18,278	-	216
Fire Station 3		N	N	31,901	2,859	-	109
Fire Station 2		N	N	17,796	2,572	-	105
Fire Station 4		N	N	26,651	4,538	-	130
Gravel Pit/Salt Shed		N	N	107	-	-	2
LFNR Garage		N	N	15,223	-	950	20
Bacon Free Library		N	N		-		
Morse Institute Library	Ice Chiller System for HVAC	N	N	777,400	20,148	-	664
Police & Fire Headquarters	Dispatch, EOC, LockUp, Repair Garage	N	N	833,800	28,601	-	979
Town Hall	Computer Control Center/Phone	N	N	601,998	15,643	-	335
East School		N	N	64,880)	8,490	121
Total							

Facility Name	Technology Systems (Describe)	Solar?	Other?	Utility Consumption			
Water Treatment - Springvale Facilities				1,320,120	17,717	-	411
Water Treatment - Springvale Facilities							
Water Treatment - Springvale Facilities							
Water Treatment - Springvale Facilities							
Water Treatment - Springvale Facilities							
Total							

Facility Name	Technology Systems (Describe)	Solar?	Other?	Utility Consumption			
Eliot School				45,175	-	14,183	125
William L. Chase Arena						-	
Total							

Facility Name	Technology Systems (Describe)	Solar?	Other?	Utility Consumption			
JJ Lane Park							2
Memorial Beach Building							925
Camp Arrowhead							92
Camp Mary Bunker							2
Total							

Total Building Square Footage

Facility Name	Personnel Assigned
Cole Recreation Center	1 DPW Custodian
Community Senior Center*	Contract Cleaner
Recycling Center	Preventive Main. & As Rqd
DPW Administration	Contract Cleaner
DPW Vehicle Service	Contract Cleaner
Fire Station 3	Preventive Main. & As Rqd
Fire Station 2	Preventive Main. & As Rqd
Fire Station 4	Preventive Main. & As Rqd
Gravel Pit/Salt Shed	Preventive Main. & As Rqd
LFNR Garage	Preventive Main. & As Rqd
Bacon Free Library	Preventive Main. & As Rqd
Morse Institute Library	1 Contract Cleaner, 1 DPW Custodian
Police & Fire Headquarters	1 DPW Custodian
Town Hall	1 Contract Cleaner, 1 DPW Custodian
East School	
Total	

Facility Name	Personnel Assigned
Water Treatment - Springvale Facilities	Contract Cleaner
Water Treatment - Springvale Facilities	Contract Cleaner
Water Treatment - Springvale Facilities	Contract Cleaner
Water Treatment - Springvale Facilities	Contract Cleaner
Water Treatment - Springvale Facilities	Contract Cleaner
Total	

Facility Name	Personnel Assigned
Eliot School	Preventive Main. & As Rqd
William L. Chase Arena	Preventive Main. & As Rqd
Total	

Facility Name	Personnel Assigned
JJ Lane Park	Preventive Main. & As Rqd
Memorial Beach Building	Preventive Main. & As Rqd
Camp Arrowhead	Preventive Main. & As Rqd
Camp Mary Bunker	Preventive Main. & As Rqd
Total	

Total Building Square Footage



Town of Natick

Facilities Management Study

Appendices:

Draft Memorandum of Agreement between the Natick Public Schools and the Board of Selectmen

DRAFT

Town of Natick Department of Facilities Management

Memorandum of Agreement Between the Board of Selectmen and School Committee

As provided by section 37M of the Massachusetts General Laws the Natick School Committee and Board of Selectmen agree to the creation of a joint municipal and school facilities management department that will be known as the Department of Facilities Management and be organized as outlined in this Agreement. Nothing in this Agreement shall prohibit either the School Committee or Town Meeting from rescinding this Agreement as provided by law.

Article I. **Department of Facilities Management:** The Department of Facilities Management (DFM) shall be responsible for the coordination and care of all town-owned buildings inclusive of those under control of the Board of Selectmen, Library Trustees and those under control of the School Committee. It shall coordinate for each building, except where noted, the following:

- custodial care/cleaning
- maintenance and repairs
- landscaping and pedestrian snow removal
- capital improvements
- procurement of necessary goods and services, including fuels and utilities

Article II. **Facilities Management Board:** The Department of Facilities Management shall be under the direction and control of a Facilities Management Board (FMB) that shall be composed of the Town Administrator and the Superintendent of Schools or their designees. The FMB shall be responsible for appointing the Director of Facilities Management for a term not to exceed three years. The FMB shall establish the compensation and benefits of the Director.

Article III. **Director of Facilities Management:** The Director of Facilities Management shall administer the Department's responsibilities under the supervision of the FMB. The Director shall be specially fitted by education, training and experience to perform the duties required of this Department. The Director shall appoint and remove, subject to approval by the FMB, assistants, agents and employees as may be required, pursuant to all Town personnel policies, collective bargaining agreements and relevant statutes.

The Director will ensure that the assignment of personnel to a building is consistent with state and federal law, including CORI standards, and policies of the School Committee and Board of Selectmen.

Article IV. **Employer:** The School Committee shall represent the Town for the purpose of bargaining with non-management employees of the Department. No collective bargaining agreement will be negotiated without consulting the Board of Selectmen. The Town Administrator shall be considered a voting member of the School Committee for the purpose of approving collective bargaining agreements with Department of Facilities Management unions.

The terms of employment for non-union employees of the Department of Public Facilities will be governed by the Town's Personnel By-Law.

Article V. **Building Managers:** Each municipal and school building shall have a building manager (e.g., school principal, library director, police chief, etc.). The building manager shall have the right to provide direction to any custodial staff working in the building. The building manager shall be included in the hiring process for any custodial staff working in that building. The building manager shall have the right to petition the Director to remove building staff working in that building. The Superintendent of Schools, in the matter of school buildings, or the Town Administrator, in the matter of municipal buildings, shall address any unresolved differences between a building manager and the Director, depending on the building involved. In such instances the decision of the Superintendent or Town Administrator, as applicable, shall be final.

Notwithstanding the rights of the building manager, the Director shall have the authority to redeploy building staff temporarily or permanently, system-wide, in a manner that yields the most efficient and cost effective maintenance and care of Town buildings.

Article VI. **Operating Budget:** The Director shall be responsible for developing an annual operating budget for the Department consistent in format and detail with other General Government departmental operating budgets. The operating budget shall be sufficiently detailed to show separate budget allocations for school buildings and for municipal buildings. The school building portion of the operating budget shall be submitted to the Superintendent of Schools and approved by the School Committee prior to submission to the Town Administrator. The Department budget shall be considered a shared expense budget when presented to Town Meeting.

Article VII. **Capital Plan:** The Director shall be responsible for developing an annual capital plan for the Department, as well as updates to that plan in

advance of each Fall and Spring Annual Town Meeting; these updates are effectively the capital budgets. These submissions shall be consistent in format and detail with other departmental capital plans. The capital plan and budgets shall be sufficiently detailed to show the capital requirements, including major pieces of equipment, separately for school buildings and for municipal buildings. The school portion of the capital budget shall be submitted to the Superintendent of Schools and approved by the School Committee prior to submission to the Town Administrator.

Article VIII. **Use of School Buildings and Municipal Buildings:** The signatories to this Agreement share the goal of a common scheduling system and agree to work towards this goal. All fees collected by the Department for the use of school and municipal buildings shall be accounted for in appropriate Revolving Fund(s), subject to Town Meeting approval, and expended as provided by law.

This Agreement is effective on the last date of execution by signatories as shown below, by authorized votes of the Board of Selectmen and the School Committee, and shall remain in effect unless revoked by the School Committee, Board of Selectmen or Town Meeting. Amendments to this Agreement may be made by mutual agreement between the Board of Selectmen and the School Committee.

DRAFT



Town of Natick

Facilities Management Study

Appendices:

Massachusetts General Laws: Ch. 71, Sec. 37M.

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PART I ADMINISTRATION OF THE GOVERNMENT (Chapters 1 through 182)
TITLE XII EDUCATION
CHAPTER 71 PUBLIC SCHOOLS
Section 37M Consolidation of administrative functions with city or town

Section 37M. (a) Notwithstanding the provisions of chapter forty-one or chapter seventy-one or any other special or general law to the contrary, any city or town which accepts the provisions of this section may consolidate administrative functions, including but not limited to financial, personnel, and maintenance functions, of the school committee with those of the city or town; provided, however, that such consolidation may occur only upon a majority vote of both the school committee and in a city, the city council, with approval of the mayor required by law or in a town, the annual town meeting or in a town with no town meeting, the town council.

(b) Notwithstanding any general or special law to the contrary, a decision to consolidate functions pursuant to paragraph (a) of this section may be revoked by a majority vote of either the school committee of the city or town, or the city or town, or both as such vote is described in said paragraph (a).